

The Textual Construction of High Needs for Funding Special Education in Ontario

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In this article I have examined one particular funding policy for special education in Ontario. Specifically, I was concerned with the deleterious effects of the interpretations and implementations of this policy. To make claims to fund special needs, school boards had to implement a highly impersonal bureaucratic process that separated the textual mode from the lived reality. The all-consuming process of identification and labeling of students guided by stringent Ministry-imposed criteria led to unwanted and unintended consequences.

Key words: education policy, funding, accountability, institutional ethnography, special education, Ontario education

Dans cet article, l'auteure analyse une politique de financement ayant trait à l'orthopédagogie en Ontario. Elle se préoccupe tout particulièrement des effets délétères des interprétations et des applications de cette politique. Les commissions scolaires qui voulaient demander des fonds pour soutenir l'intervention orthopédagogique ont dû mettre sur pied un processus bureaucratique très impersonnel qui séparait l'aspect formel de l'intervention de la réalité vécue. Le processus fastidieux d'identification des élèves qualifiés d'« élèves en difficulté » à l'aide des critères stricts imposés par le ministère a entraîné des conséquences indésirables.

Mots clés : politique en matière d'éducation, financement, imputabilité, ethnographie institutionnelle, orthopédagogie, éducation en Ontario.

"Look carefully and you see a mode of action entirely in texts" (Smith, 1996, p. 180).

A significant trend in the recent history of educational policy making has been the growing demand for more stringent accountability measures.

The "comprehensive package of accountability" (Leithwood, 2001, p. 2) has not left any aspect of school life untouched, including the increased use of tests or assessments to measure curriculum outcomes and learning, the development of strict certification requirements for educators, increased disciplinary measures and centrally mandated and controlled fiscal accountability, and efficiency measures (Anderson, 2001) that are politically driven by the rationale of cost efficiency. Issues in special education have become an integral part of the educational restructuring process, and the way funding is allocated for children with special needs is part of this larger infrastructure of changing ideologies, discourses, and practices. The questions of cost-efficiency and value for money pose special dilemmas for special educational resources in times of tight budgeting and audits.

The focus of this study is the effects of one particular educational policy specifically, the Intensive Support Amount (ISA) policy¹ for funding students with special needs. This funding policy introduced stringent guidelines and bureaucratic procedures to make successful claims for funding students with special needs. In particular, I investigated the preparation of folders representing students with special needs in the process of implementing accountability practices for funding special education. The ISA funding process co-ordinated and organized the construction of students to make claims on funds for the education of students with special needs. The increasingly bureaucratic nature of special needs funding "textualized" particular students as having high needs for funding purposes.

Textual forms of knowledge, communication, and practice are very much part of the work of educators. In the work of producing an ISA folder (Intensive Support Amount), that contains the required documentation for funding claims, a "textual" child is constructed through the extensive documentation required for ISA funding. This exercise is a complex work process that separates the textual mode from the lived experience through an inter-textual dialogue in which the lived experiences of children, teachers, parents, educational assistants, and others are subsumed by the textual process of identification and labeling.

RESEARCH CONTEXT

My study examined the issue of funding provisions for special education in Ontario against the backdrop of general changes in the system. I focused on one particular aspect of accountability embedded in the funding formula entitled, "Student-focused funding" introduced by the Ministry of Education and Training. The funding formula outlined a complex process of financing education through layered funding. Specifically, I researched one feature of funding for special education: the Intensive Support Amount (ISA) claims policy for students with high needs under the title of Student-Focused Funding.

The ISA claims procedure involved a range of educators, professionals, and others with expertise in the pedagogy and administration of special education. To receive funding, school boards had to adhere to stringent guidelines and protocols that the provincial Ministry of Education and Training (MET) in Ontario established. The Ministry built accountability into these layers by means of prescribed eligibility criteria, called profiles, which demanded increased documentation and audits. Prior to ISA, the Ministry based funding for students needing special resources and services on the numbers that schools and local boards identified. ISA funding, however, required complex bureaucratic procedures. "Financial rationing" (Lee, 1996, p. 4) by which the Ministry allocated sums of money through a competition led to the creation of a composite, hierarchical, and extremely costly work process implemented by school boards across Ontario.

Researcher Context

This study originated from my own experience as a school-based administrator in 2001 when the ISA claims process was being implemented. I became an active participant, and as I engaged in this work, I began to realize the textual nature of this exercise that was organized and dictated by rigorous guidelines and procedures. I began to interrogate how I engaged in ruling practices even as I thought I was helping students. "Ruling, as practised by professionals, is often done in the interest of even-handed and accountable administration" (Campbell

& Manicom, 1995, p. 11). I put many other services to students on hold because preparation of ISA claims took precedence in my daily routine.

CONCEPTUAL FRAMEWORK

For this research, I have used two primary analytical frames that support and complement one another. The first is the conceptual frame of a policy sociology approach based on the work of Stephen Ball (1990a, 1990b, 1994, 1997, 2001). The second frame, institutional ethnography as a mode of inquiry, is based on the work of Dorothy Smith (1987, 1990, 1996, 1999, 2002).

Policy Sociology

To understand how special education is situated within the general structure of new accountability policies in education reform, I explicate how education policy is influenced, produced, and implemented. This is achieved by looking for a set of socio-historical conditions that limit the possibilities for thinking of alternatives to the present situation. The conditions of globalization, the rise of market strategies, and the discourse of crisis, all create the context for the emergence of educational policies that depart from social democratic values and beliefs. In this approach, power is seen as diffused throughout the system; no one person wields it. Power is exercised from a distance through surveillance and ruling. Power is exercised through its effects, through a "combination of micro-disciplinary practices and steering at a distance" (Ball, 1997, p. 260).

Ball (1994) conceives of policy both as text and discourse. Text and discourse are implicit in each other. Policy as discourse has specific characteristics in that the "effect of policy making is primarily discursive; it changes the possibilities we have for thinking otherwise" (Ball, 1994, p. 23). Discourse generates, limits, and restricts educators in many ways by constructing certain possibilities for thought and action through the use of certain propositions and words (Smith, 2002). It is the social relations of a "discourse mediated by texts" (Smith, 1990, p. 160).

Bowe and Ball with Gold (1992) conceptualize policy operating in three primary contexts in the trajectory of policy: the context of influence, the context of policy text production, and the context of

practice. Policies are initiated in the context of influence where policy discourses are shaped and constructed. The struggle takes place in different arenas. Some occur openly, and some behind the scenes as policy texts are articulated and produced. The path from the context of text production to the context of practice is neither linear nor straightforward. They state that "policy writers cannot control the meaning of their texts" and "interpretation is a matter of struggle" (p. 22). Policy, therefore, is understood as both text and discursive action, an important feature of institutional ethnography as a mode of inquiry.

Institutional Ethnography

Institutional ethnography (IE) analyses textual practices to explore the institutional framing of the production, promotion, and use of accountability measures as textual practices. IE, pioneered by Dorothy Smith (1987, 1990, 1999, and 2002) and further shaped by the work of Griffith (1995) and Griffith and Smith (2005), is a critical approach to social inquiry that claims that knowledge holds the social values of those who develop it, and that what people know and how people know is embedded in the power relations of society. In IE inquiry, scholars examine policy texts to determine how these texts actively engage people in social relations. Thus, people's policy-based work comes into view as activities that are organized through texts. Accountability measures enforced by policy texts have a huge impact in shaping the daily activities of children, teachers, parents, administrators, and others in education. In IE, the purpose of the research is to "explain the behavior of the economy, or the society, or the political process to people, particularly as these enter into, organize, and disorganize people's lives" (Smith, 1999, p. 32).

Social relations, a technical term, directs attention and takes up analytically how the work experiences of people in local settings are connected to sequences of action in multiple sites far removed from the local setting. In IE, the social organization of knowledge itself is the focus of inquiry. It starts from the premise that knowledge cannot exist independently of knowers. As such, the investigation focuses on the ongoing coordinated practices and experiences of people and the activities with which they construct and accomplish the social world.

The IE task, then, is to reveal that objectified world vested in texts that coordinate and influence decisions, policies, and plans of individuals, organizations, and institutions that form the discourse in that setting (Smith, 1990). As Smith (1999) concludes, the aforementioned task challenges researchers because,

The documentary method of interpretation is a circular process. . . . What we see and hear is interpreted in relation to an underlying pattern or schema; the underlying pattern or schema selects and orders the way we attend to things and hence what we see or hear. (p. 163)

RESEARCH METHOD

I received permission to conduct research (interviews and document analysis) from the research ethics board at my university and one local school board located in a large urban centre. I conducted unstructured interviews with 16 key informants, educational professionals in the special education field: teachers, consultants, educational psychologists, supervising principals, and ministry auditors whose insights and perspectives into the work of preparing claims for ISA enabled me to focus on the lived reality of this funding exercise. In addition, I included my journal entries containing my reflections and observations and a collection of correspondence gleaned from my role as a school administrator. Further, I analyzed primary and secondary documentary sources that included ministry news releases and policy documents. In this study, data collection and analysis were an ongoing, seamless process. I engaged in constant comparison, identifying similarities and grouping them into emerging themes while recognizing that these depended upon my lens and partiality of my understandings and interpretations, an essential element of qualitative research (Creswell, 2003). Further, I used the understanding of crystallization (Janesick, 2000) to analyze data, a method in which I could recognize the multiple interpretations and ever-changing aspects in any given approach that attempts to capture the lived experiences in a social organization.

OVERVIEW OF THE ISA POLICY PROCESS

The Ministry of Education (2001) stated that the key goals of the ISA funding approach were fairness and equity, providing funding to match

students' needs and boards' costs. The Ministry determined that ISA funding was not allocated to specific students or that it could be used on a strict student-by-student basis, although claims were made in a student's name. Initially, this particular line of reasoning, which caused a great deal of confusion, was subject to misinterpretation. The Ministry intended the ISA process to serve as a demographic analysis to establish a baseline for funding. This funding model was resource-led where a finite amount allocated by the government was to be distributed across the province. This shift in funding from a demand-led model (where governments allocated resources in response to needs) to a resource-led model "has occurred across whole societies in Western countries and reflects one of the societal attitudes which need to be taken into account" (Stakes & Hornby, 1997, p.6).

The Ministry of Education based the system for developing the ISA grant formula on the assumption that what worked well for funding education programs for hearing and visually impaired students could be applied to all other exceptionalities (Bradt & Hardwick-Leclerc, 2000). However, when this approach emerged as ISA claims policy, a contentious process evolved because boards clamored to identify an increasing number of students with high needs to maintain their current level of funding. More importantly, because claims submitted during the 2001-2002 comprehensive review became the baseline for funding school boards in subsequent years, the stakes were very high for school boards in the province. The school board where I completed my study sent a message to all school administrators:

The [name] school board is committed to submitting a minimum of "n" high quality ISA claims for ISA 2001-2002. This is the minimum number we require in order to retain our current level of supports. As of date approximately "n" files are under consideration. Files are compiled by ISA teams, composed of school-based and central staff, and are subjected to two internal audits prior to submission to the Ministry. (e-mail, Jan 17, 2002)

The most important components in this claim process were the profiles for each exceptionality because the claim made for each student had to match the profile for that particular exceptionality. The process required rigid adherence to standardized classification criteria and formulaic intervention practices (Schafer, 2004) through exhaustive documentation

such as a professional assessment, teacher/school documentation of needs, an Individual Education Plan (IEP), and careful timetabling. The various "texts" in this process worked to construct a folder that matched the eligibility criteria laid down in Ministry guidelines. The Ministry revised these guidelines several times to clarify the different readings and interpretations of this policy.

FINDINGS

The Lived Reality of the ISA Funding Exercise

The ISA was one example of a text-mediated process, organized through an inter-textual dialogue in preparing claims for funding. One supervising principal for special education at the local school board who oversaw the claims in her jurisdiction gave me a detailed description. Her narrative exemplifies Pence's (1997) description how "members of the institution are trained to read and write in institutionally recognized ways" (p. 91). Throughout this process, the ministry profiles created the textual frames that provided scientific justification for student pathology within which the work of preparing files and conducting audits took place.

So, we had very few kids qualify. In the meantime, D [a high ranking official at the board] and some other people at the top were working with the Ministry to change the criteria, and to tell them that we had all these other kids who were very needy, but they weren't fitting into the criteria. So, in the second "blitz" they changed the criteria; it was more inclusive of our kids, but again it involved a lot of reassessment. A lot of our DD [developmental delayed] children, we took them in through medical diagnosis, but they wanted adaptive testing, and things like that which we weren't doing with all our students. So, that involved a lot of redoing of testing. The LD [Learning Disability] had to have 1.5 or 2 standard deviations (I can't remember exactly) and that created a problem, too. And then we had to rewrite all the Individual Education Plans to cover all the things that were in the criteria. (Supervising Principal 2)

Another special education consultant told me about the chain of textual organizational action from the moment the folder came to her and as it proceeded to the next stages. The audit discourse was paramount at each processing interchange in the organization of textual work, relations, and experiences.

From me, the folder goes to the ISA guardian. She enters it into a database. She then sends it to the board audit. Because I audit it, make sure it is right in that the IEP [Individual Education Plans] and other documents match the requirements of the profiles. Then I give it to my coordinators, and they audit it. Then it goes to central audit -- so in this way a file is audited at least three times before it gets to the Ministry level. They want to make sure it meets the requirements, or else it brings our percentages down. (Consultant 2)

The above narration demonstrates how school systems took action at each interchange (Pence, 1997) which then connected to other steps in the claims exercise of preparing a folder with the appropriate texts to successfully secure funding for the school boards. The dictates of the profiles organized the work of different professionals and the social relations of ruling in such a way that the practice was rendered routine to objectify the student into a category for claims. These forms of objectification were "organizational pathologies created by specialization and professionalization and compounded by rationalization and formalization" (Vislie & Langfeldt, 1996, p. 66).

One consultant provided specific guidelines on how to prepare a behavior report. This consultant's e-mail noted:

There are two areas that must be addressed in the reports using specific ISA language:

Under the section *Assessment Summary* there needs to be a statement that the student's behavior threatens the safety of self and others (in these words). . . . In the sample report form given to you, the above statement is recommended since the behavior profile focuses on safety. In future reports please make sure the safety statement is made in section C even if safety is discussed in other parts of the report. (e-mail communication, February 11, 2002)

In this message, and several others, the discourse focused on IEPs and reports, mainly an emphasis on texts to indicate pathology to access funding.

Re-emergence of a Medical Model of Disability

The medical/individualistic perspectives "that locate disability in the pathological impairments or deficits of individuals within an individual-theoretical paradigm (Slee, 1998, p. 128) was clearly visible in ISA claims

work. With a need to identify a specific number of students, school boards worked hard to satisfy the demands of the newly established comprehensive review to establish a baseline for funding in the future. It was crucial for the boards to get the appropriate numbers, causing concern for educators.

But the thing that troubles me more than the financial aspect is what we have done to a whole generation of kids in terms of document[ing] them as disabled, dysfunctional, hopeless kids. (Educational Psychologist 1)

I don't like the diagnosis aspect because it works from a deficit model. (Teacher 3)

Here, we are going against all the things we believe in. I see labels as -- in the last round I have been doing behavioral reports and the more difficult the behavior, the more the money. We have to document all the negative behaviors. (Teacher 1)

Teachers found the Behavior Profile especially challenging. It required elaborate documentation: formal, signed psychologist or physician or social work assessments; reports from mental health agencies; behavioural logs (for the past six months); suspension letters; Safe Schools documentation; bus reports and letters; IEP and individual timetables; and safety plans.

In the report of Dan (pseudonym), a nine-year-old student, the Behavior Profile included phrases such as "significant behaviour problems," "regularly steals," "requires constant monitoring," and "aggressive and devious behaviour." The IEP continued with the use of similar phrases throughout to ensure that the language of the behaviour profile was consistently evident in all the documents. I interviewed the special education resource teacher (Teacher 2) who had worked with Dan that year. When we discussed Dan's Behavior Profile, she remarked:

In September, some teachers informed me about an ISA behavioral student at the school. (He [had] been identified in the previous round of claims.) When I saw him, I said to myself, "Is this the kid they have been telling me about?" The problem was that once he was labeled he did not stand a chance. Do you see that stuff that is written in that report about stealing? The complaints were that he "stole" pieces of chalk, pencils, and erasers and that was because other children told the teacher he did that. I assessed his language skills. He was one grade above his grade level in that area, and he was very articulate. Dan is a bright

young boy who should not be treated in this manner. Granted there have been problems in the regular classroom, but no way was he the "deviant" depicted in the report. (Teacher 2)

She also told me that Dan's parents were surprised at the terrible reports they had been receiving from the school. They did not see evidence of such behaviours and to that extent at home. This teacher felt that the IEP portrayed Dan in such a negative manner to receive funding. She told me about writing two different IEPs: one regular IEP and another one written under the guidance of the ISA guardian, a retired school principal, who came to the school to assist her in writing the IEP for the ISA files.

In comparing the written reports and IEP for Dan to the ISA behavioural profile, I found that the report and IEP mimicked the language of the profiles. For example, in the behavior profile, the section on "Evidence of Related Difficulties" had a subsection on "uses profanity excessively," and Dan's report indicated the following:

Frequency: This student uses profanity on a daily basis

Intensity: Student frequently swears under his breath in the classroom and swears directly at the other students which leads to or exacerbates existing problems and is agitating in the classroom.

Duration: This student has been seen to engage in this behavior for more than six months.

Other sections of the report followed the same pattern, with little regard for contextual factors or triggers for the manifestations of behavioral problems. Through the use of a particular set of practices and tools, a child with a need was ascribed a specific connotation, e.g., student Y is ISA 1.2 or 1.3,² the "different modes by which humans are made subjects by processes of classification and division" (Ball, 1990b, p. 3).

In recent years, there appears to be an increase in the number of students identified under the various categories of behavioural disorders. Slee (1998) argues that the label

transforms pupil disruption to pupil dysfunction, and yet again we see that the emphasis is on individual pathology and dysfunction. Thereby we return to an essentialist frame where the impaired pathology of the child is the problem to be

managed. . . . It is an individual pathology that becomes the site for chemical intervention. (p. 133)

One of my informants told me how a particular behaviour issue was documented.

I heard from one staff member that they [the EAs] would follow children into the washrooms, so they could catch a student with a behavior and/or intellectual disability masturbating, so they could document inappropriate behavior to qualify for ISA funding. It's immoral! (Supervising Principal 1)

Although this might be a case of compliance taken to extreme, it nonetheless indicates that surveillance, observation, and documentation shaped people's work.

The documentation of behaviours, in the example of Dan, demonstrates that ideology operated as "the imposition of objective, textually mediated conceptual practices on a local setting in the interests of ruling it" (Smith, 1999, p. 21). The behaviour profile filtered what people doing the documentation saw and heard, and they interpreted what they saw and heard in relation to the underlying schema for an ISA claim.

In the case of another student, Chris, a similar circular process was at work. Chris was identified as behavioural for ISA funding. If he had made significant progress, then he would not be worthy of an ISA claim. The ministry auditor was cognizant of this situation. In our discussion of this problem, he remarked:

There was another Catch 22 situation around the behavior profile in particular. If we have an EA, or enough support, then the child might not exhibit the behaviors required to make the claim. Do we have to pull the person out, so the child can exhibit those behaviors? So, sure, we are aware of such issues, and hopefully now that it has come to a successful conclusion with a considerable amount of money to address these issues. (Ministry Auditor 1)

Thus, many students were pathologized in a textual reality by the organizational features of professional work that started out with good intentions, but as one informant remarked, "people got sucked into the ISA number game" (Supervising Principal 3).

The ISA Game

Another theme that emerged from my analysis was that most people talked about the ISA process as an audit game they had learned to play well. The competition for ISA dollars for special education needs was about winning or losing money. Because school boards realized the importance of making successful claims, they devoted significant resources for this purpose. Everyone I interviewed at the board and school level used the game metaphor to describe the ISA process. The ISA "game" had rules and the way the rules were interpreted varied from board to board. After the first round of funding applications for ISA, special educators began to compare their work with the work of others: who was more successful and why, and who was bending the rules and in what manner.

The board could say, these are the rules of the game given by the Ministry and we are going to obey the rules to the absolute dot or we could interpret it according to our view of what the rules are and do the best. Our board adopted the latter view and submitted the files, and we ended up with a lot of funding. So after the first year, it didn't take long for people to sit up and say, "Hey, wait a minute, we are all playing by the same rules, so how is it that your board got a bigger share of the pie?" (Consultant 1)

And there was a lot of pressure on quotas, so people were getting extremely anxious that they haven't reached their quota -- it all became part of the numbers game. (Educational Psychologist 2)

The language used in the different texts that made up the ISA folder was crucial and staff had to learn specific terminology. One consultant described the process.

A teacher had to do an anecdotal record that outlined the related difficulties, and then a timetable and an IEP which addressed those related difficulties. That was tricky -- trying to get them to match things up and the report card had to match as well. It was a matching game. So, we'd take a look at their files, and then consult with the psychologists to see if the numbers are right -- because it's a number game. Then we'd fill out the form. (Consultant 4)

Many of my participants described the impact the game had on their work and on the children in their care. One supervising principal, who was delighted that I was investigating ISA claims, commented that I was

very brave to take this on; she hoped that people would take notice of my findings. She wanted to make her voice heard through her interview. Some talked about the precious time taken away from servicing children in need, and about the inequities of not being able to attend to children who had moderate needs and did not qualify for ISA funding. These children were put on a wait list because all other work was suspended during the four rounds of the review for ISA claims.

Only in urgent cases, or where a safety concern arises, something is being done. A child who is quiet, but needs a moderate amount of support could get left behind as a result of the ISA process. We are already short-staffed and the backlog will only get worse. How will we make up for lost time? It is very tragic and we are going to feel the repercussions for a long time. (Supervising Principal 4)

Some participants were upset at the amount of money being spent on this ISA game in a milieu of cutbacks to the education system. On the one hand, they had to reduce school support staff, while on the other hand, retired employees were hired on a per diem basis to assist with the funding exercise.

Boards invested a lot of money in ISA claims. They brought in retired people to help with the process. We had retired principals and superintendents. "Double-dipping" -- I would call it. Here they were getting their pensions and this was extra in their pockets. So, we had huge sums of money being put into this exercise for over two years now. There were cutbacks everywhere, but spending on ISA was not a problem. (Consultant 2)

Professionals engaged in the ISA claims process learned what it takes to make a file successful. One co-ordinating principal for special education commented during our discussion:

The ISA process as it is now does not really demonstrate needs -- it demonstrates ability to work the system. And there's this joke going around that ISA stands for "I'll Sign Anything" that will help the case. And we have learned to play the game and we argue that these children will benefit in the long run. (Supervising principal 4)

In my interviews I asked participants to propose alternatives to current funding practices. Their responses illustrate the limiting character of policy as discourse. Most were unable to articulate different

options. They perceived the current measure as a "necessary evil" because "we all needed to be accountable to the public" and "we had to do our jobs." The discourse of accountability appeared to be firmly entrenched, obstructing the possibilities for conceiving alternatives to current practices. Such responses were articulated as "regimes of truth through which people regulated and were regulated" (Ball, 1994, p. 176).

DISCUSSION

In this study, I investigated how a variety of ruling and authoritative knowledges organized the textual construction of students whose needs were significantly different to make claims on funds earmarked for students with high needs. The ISA policy could be read as a narrative, a position supported by Ozga (2000) who has argued that policy texts should be dissected "for their portrayal of character and plot, for their use of particular forms of language in order to produce impressions or responses . . ." (p. 95).

The ISA policy process was a different way of funding public education in general and special education in particular. Student-Focused Funding, the umbrella name for these new funding initiatives, turned out to be a misnomer. The focus was more on the bureaucratic process. This ISA policy did not appear in isolation, but was part of the reconfiguration of social institutions such as education and health care in which new rules based on cost-effectiveness and accountability had taken root. These new measures led to an overhauling of the welfare state "to establish a new consensus based upon privatization and market individualism" (Phillips, 2001, p. 16). The discourse of business and management became part of the hegemonic rightward turn within society in general and in education in particular.

The Ministry achieved the text-mediated construction of a folder for claims through organizational and institutionalized practices (such as testing, assessments, report cards, education plans, and observation reports) that matched an individual child against a standardized profile that the Ministry had generated. Smith (1990) argued that "It [the folder] involves assembling observations from actual moments and situations dispersed in time, organizing them, or finding that they can be

organized, in accordance with the "instructions" which the concept provides" (p. 15).

For ISA claims, the profiles provided the conceptual underpinnings and the instructions that had to be followed in creating a claims folder. They achieved textually mediated work mainly through organizational practices of documentation and paperwork (to a large extent by computer-based technologies) that rendered invisible the interpersonal work done in everyday practices (Griffith & Smith, 2005). In ISA work, organizational issues took precedence with a greater emphasis on the technical issues of diagnosis and labeling. In the exclusive focus on disability that led to categorization according to prescribed criteria, assessors paid little attention to the complexity of contextual features in the process. IE took on that challenge to find space for greater sensitivity for the interpersonal work in the policy narrative

The simple goal for ISA, "to provide fair and equitable funding which recognized that boards have differing proportions of high needs students and to ensure that funding matched the students' needs and the boards costs" (Ministry of Education, 2001), set in motion a range of processes and organizational bureaucracies that quickly spiraled out of control. Board and ministry officials might dispute this claim, to argue that they needed ISA funding procedures to ensure that monies were distributed fairly. The oft-quoted phrase was, "Of course we needed consistency and we must be accountable." Such perspectives were simple representations of a very complex reality. To facilitate better insights into fiscal matters, there was a need to seek answers that went beyond formulaic thinking. Because the ISA formula was flawed, it became a bureaucratic quagmire that focused on accountability and consistency at the cost of rationality, simplicity, and efficiency. To qualify, boards had to make successful claims to determine funding for years to come. Much was at stake in this funding exercise. The ISA formula, which was unsophisticated, did not account for many of the variables that assessors should have considered. The focus on consistency across the province took precedence over other considerations.

Funding policies should support and enhance the goals of an educational program. The ISA process, over the course of four

comprehensive reviews, has failed to do that. In fact, the ISA process led to demoralization and erosion of trust. As one professional remarked:

It's like they don't trust us any more. This is the first time that I am eagerly looking forward to retirement. This ISA work has sapped my energy and enthusiasm, and I hate feeling like that. I feel we have lost our integrity as professionals. (Teacher 3)

The quotation above points to the practices put into place by the ISA process that became self-regulating, in that they sustained their power independent of people, while appearing to be neutral as hegemony worked its way through "the disciplinary practices of the profession (Pence, 1997, p. 36) in the service of good organizational practices.

Professionals worked up texts to make a successful ISA claim. These texts highlighted the corruption of special education in the name of accountability and efficiency. A policy that started out with good intentions quickly spun out of control. My analysis has shown that the policy process, and its intersection with the everyday lived reality, was mediated mainly by texts, print and electronic. These constituted the central frame that set up the ISA policy. The biggest flaw in the policy was that school personnel came to view ISA solely as a funding exercise with little thought or planning of the contextual features and contingencies of the implementation process. Thus, by the end of the implementation process, the true intent of the policy-makers, of fair and equitable funding, disappeared in a shuffle of texts, documents, assessments, and percentiles, all done in the name of procuring maximum funding for students with special needs.

The Ministry of Education conducted a review of ISA claims (July 28, 2004). The review found that between 2001-02 and 2003-04 claims for ISA funding doubled from 27,000 to 54,000, even though overall enrolment declined. Further, the school boards estimate of \$63 million in June 2003 for ISA students skyrocketed to \$162 million in just four months. In addition, the review found that school boards had placed approximately \$80 million in reserves for their special education needs. These statistics provided in this review confirm the argument made in this article that the true intent of the ISA policy of determining a baseline for funding turned into a competition for claims.

CONCLUSION

In the lived reality of the funding exercise, this study demonstrated the manner in which the work in special education had become "bogged down in claims" over the past few years. Valuable time and resources were taken up in constructing a textual folder for funding in a complex web of social relations in which the work appeared neutral as students were linked across sites through a shuffling of texts. The construction of an ISA folder relied heavily upon a focus on pathology to meet the requirements of the Ministry's profiles. Through a proliferation of categories, labels, and numerical counts in a discourse of accountability and audits, the ISA process evolved into a game that had to be played well; it had winners and losers.

The Ministry intended the ISA policy, as conceived, to bring equality and fairness in funding special education needs in Ontario. The road from policy to practice, though paved with good intentions, turned out to be a rocky and controversial. Policy makers failed to take into account the contingencies of policy in local contexts. The ISA funding policy was "part of the significance of the discourse is the impossibility of reply . . . as the discourse replaces the articulation of interests with mechanisms such as technologies of measurement, testing, management" (Ball, 1990b, p. 58). Thus, the social relations of ruling were accomplished through the text-mediated organization that constitutes the work process for making successful claims. This study of the ISA process showed that power over educators operated in insidious ways as textual forms served to objectify and construct children for funding purposes as deviant through the increased focus on organizational work at the expense of interpersonal work. In deconstructing the ISA claims policies and practices, I have uncovered in this study the different layers at work in text-mediated governance. There is a need to move toward constructive and productive alternatives that explore the possibilities of "thinking otherwise."

I conclude this ISA narrative with this quote from the educational psychologist who articulated the whole debate succinctly: "This is purely a funding exercise that had very little to do with the children in reality" (Educational Psychologist 2).

ACKNOWLEDGEMENT

I wish to thank Dr. Alison Griffith, Professor, Faculty of Education, York University, my advisor and mentor, for her continued support and encouragement.

NOTES

¹The ISA policy has been revised by the Liberal government in 2003-04. This research was conducted prior to the revisions.

² These numbers indicate the profile categories and the different levels within each category. Behavior profile was number 1 and 1.1 and 1.2 were the levels of severity within that category.

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